DESCRIPTION OF RECORD CATEGORIES

Issued February 1993
Revised June 1993

CATEGORY CODE	RECORD CATEGORY / SUB-CATEGORY	RETENTION PERIOD
A0560	ACCIDENT/INJURY REPORTS	C+1
	Accident Reports	
	Emergency Response Team – Incident Report	
A0570	ACCRUALS, YEAR END	C+1
	Accruals, Year–End	
A0150	ADMINISTRATIVE	C+2
	Affirmative Action	
	COE – Cooperative Education Evaluations	
	Contingency Planning	
	Diversity	
	Employee Recreation Association (ERA)	
	Holiday Schedules	
	Lease Data, Expired	
	Overtime Sheets	
	Phone Orders	
	Postage Reports (PED)	
	Receiving Tickets	
	Security Audits	
	Shipping Requests	
	Summer Employment	
	Sundry Orders	
	Travel Records	
	Trip Reports (general)	
	Tuition Requests/Refunds	
	Uniform Allowance	
	Union Activities (RBO)	
	Vacation Schedules	
	Vehicle Logs/Maintenance	
	Vendor Reports	
	Visitors & Tours	
	Work Orders	
A0350	APPLICATIONS/RESUMES	C+1
	Resumes/Interview Notes	

PM3000421195

Source: https://www.industrydocuments.ucsf.edu/docs/ggdl0001

CATEGORY CODE	RECORD CATEGORY / SUB-CATEGORY	RETENTION PERIOD
A0580	ASSET DISPOSALS	ACT
	Asset Disposals	
A0470	ASSOCIATIONS & MEMBERSHIPS	C+1
	Associations & Memberships (Corporate)	
A0630	ATTENDANCE REPORTS	C+2
	Absentee Reports	
	Timesheets	
A0502	AUDIT REPORT	C+7
	Asset Transfers (Warehouse)	
	Asset Transfers (Non–Warehouse)	
C0010	CALENDARS/DIARIES/DAYTIMERS	C+1
	Calendars/Daytimers/Diaries/Time:Text	
C0020	CAMPAIGNS/PROGRAMS/SPECIAL EVENTS/AWARDS	C+2
	Action Cost Team Correspondence	
	Awards, Honors, and Prizes	
	Campaigns (UWGR, Blood Drive, etc.)	
C0070	CAPITAL FORECASTS/CAPITAL EXPENDITURES	C+3
	Capital Budgets	
	Five Year Capital Forecasts	
C1030	CHEMICAL WASTE MANIFEST	C+5
	Chemical Waste Manifests	
C1020	CIGARETTE DISTRIBUTION (FACTORY SMOKES)	C+5
	Cigarette Distribution (Factory Smokes)	
C0550	CONFERENCES & SEMINARS	C+3
	Meetings and Conference Notes, Informal	
	Seminars and Conferences	
	Staff Meetings	

PM3000421196

Source: https://www.industrydocuments.ucsf.edu/docs/ggdl0001

	CATEGORY CODE	RECORD CATEGORY / SUB-CATEGORY	RETENTION PERIOD
	C0650	CONTRACTS & AGREEMENTS – OFFICIAL COPIES	ACT+6
	C0651	CONTRACTS & AGREEMENTS – UNOFFICIAL COPIES	ACT
		Confidentiality Agreements	
		Leases/Contracts	
		Non–Disclosure Agreements (Detailed)	
		Non–Disclosure Agreements (Routine)	
	C0770	CORRESPONDENCE	C+2
		Correspondence, General	
E ▶	E0530	EPA WEEKLY INSPECTIONS	C+1
		EPA Waste Storage Weekly Inspections	
	E0540	ENVIRONMENTAL DOCUMENTS	ACT
		Permits/Permit Applications	
	E0380	EQUIPMENT/MACHINERY	ACT
		Equipment (Non–Capital)	
F ▶	F0470	FACILITIES MANAGEMENT	ACT
		Assets Inventory	
		Building Specifications	
		Contractors/Subcontractors	
		Contracts, Facility	
		Disaster Plans	
		Facility Asset Records by BLDG. (Furniture, Office Equip., etc.)	
		Facility Drawings by BLDG.	
		Facility Inspections by BLDG.	
		Facility Permits by BLDG.	
		Facility Projects by BLDG.	
		Logger Program	
		Security	
	F0480	FIRST AID TEAM RECORDS	ACT
		First Aid Team – General	
		First Aid Team Training Records	
	F0230	FIVE YEAR PLANS	C+3
		Operating Plan	
		Strategic Five Year Plan	

PM3000421197

Source: https://www.industrydocuments.ucsf.edu/docs/ggdl0001

	CATEGORY CODE	RECORD CATEGORY / SUB-CATEGORY	RETENTION PERIOD
G ▶	G0150	GOVERNMENT LAWS/REGULATIONS/AGENCIES	SUP
		Copyright Records Job Safe Procedures	
	G0220	GRIEVANCES	ACT
		Grievances Grievance Summaries	
I ▶	I0430	INSURANCE – RISK MANAGEMENT	ACT
		Risk Assessment/Reports & Responses	
	I0370	INVOICES	C+1
		Invoices	
J ▶	J0010	JOB DESCRIPTIONS	SUP
		Job Descriptions	
	J0060	JOB ORDERS/650 APPROPRIATIONS	ACT
		Job Orders/650 Appropriations	
L ▶	L0460	LABOR RELATIONS	SUP
		Union Salary Records Union Subcontracting Notifications	
	L0280	LISTS/DIRECTORIES	SUP
		Divisional Rosters	
M ▶	M0050	MANUALS	SUP
		Computer Instructions, Manuals EPA Guidelines Manuals Generated by R&D	
	M0140	MARKETING FILES	C+3
		Marketing & Sales	
	M0340	MINORITY AFFAIRS	C+3
		Minority Expenditures	

PM3000421198

Source: https://www.industrydocuments.ucsf.edu/docs/ggdl0001

	CATEGORY CODE	RECORD CATEGORY / SUB-CATEGORY	RETENTION PERIOD
	M0390	MONETARY APPROVALS	SUP
		Monetary Approval Reports	
	M0560	MSDS DOCUMENTS	P
		MSDS Documents	
N ▶	N0110	NEGOTIATION PROCEEDINGS	ACT
		Negotiation Proceedings	
	N0130	NUCLEAR REGULATORY FILES	P
		Labelled Leaf Inventory	
		Radiation Dosimetry Inventory	
		Radioactive Waste Records	
		Radiochemicals Inventory	
O ▶	O0070	ORGANIZATION CHARTS	SUP
		Organizational Charts/Rosters	
	O0080	ORGANIZATIONAL ANNOUNCEMENTS	C+1
		Organizational Announcements	
		Promotions (Announcements)	
		Retirements	
	O0220	OSHA INFORMATION	SUP
		OSHA Information	
P ▶	P0810	PATENT COORDINATOR	ACT
		Invention Disclosures	
		Patent Review Meeting Notices/Minutes	
	P0070	PATENTS	C+3
		Patent Applications	
	P0790	PED SMOKING BALLOTS	M+2
		PED Smoking Ballots	
	P0190	PERSONNEL/EMPLOYEE FILES	ACT
		Computer Account Request Forms	
		Leaves of Absences	

PM3000421199

Source: https://www.industrydocuments.ucsf.edu/docs/ggdl0001

CATEGORY CODE	RECORD CATEGORY / SUB-CATEGORY	RETENTION PERIOD
	Performance Appraisals	
	Resignations	
	Salaried Employee Files	
P0330	POLICIES & PROCEDURES	SUP
	Policies & Procedures	
P0622	PROJECTS	ACT
	Bid Packages	
	Calculations/Design Files	
	Cigarette Intelligence Reports	
	Consultants Files	
	Continuing Fellowship Information	
	Contract Research	
	Correspondence, Technical	
	Evening Seminar Committee	
	Feasibility Studies/Proposals	
	Internal Reports	
	Laboratory Notebooks	
	Literature Searches	
	Manuscript Review Board	
	Monthly Development Summaries	
	Monthly Reports (of groups, teams)	
	PED Qualitative Test Reports	
	PED Quantitative Test Reports	
	PED Smoker Applications	
	POL Memoranda	
	Product Specifications	
	Program Objectives	
	Project Costs Tracking	
	Project/Program Listing	
	Reports (Monthly, Quarterly, Annual, Special)	
	Semiworks Production Reports	
	Semiworks Run Sheets	
	Smoke Methodology	
	State of the Union Speeches	
	Technical Seminar Committee	
	Trip Reports (if related to research projects)	
	Visiting Scientists Program	
P0621	PROJECTS – ADMINISTRATIVE	ACT
	Air Freight Bills	
	Balance & Analysis of Capital (Monthly)	

Weekly reports from Myracle's directorate (8/25/95)

PM3000421200

Source: https://www.industrydocuments.ucsf.edu/docs/ggdl0001

	CATEGORY CODE	RECORD CATEGORY / SUB-CATEGORY	RETENTION PERIOD
		Budgets/Operating	
		Capital Projects Performance Reports	
		Cigarette Transfers (not Factory Smokes)	
		Consultant Activity Reports (Quarterly)	
		Contributions Reports (Grants/Sponsorships)	
		Cost Information/Estimates	
		Engineering Drawings	
		Equipment/Machinery Evaluations	
		Expenditure Analysis (Monthly)	
		Five Year Operating Budgets	
		Idea Evaluation Team Records	
		Ideas	
		International Cost Reports (Monthly)	
		Maintenance Project Summaries	
		Meetings Organized by Philip Morris	
		Monthly Reports (of individuals)	
		New Ideas	
		Operating Reports (Year–End)	
		Plant Engineering Project Summaries	
		POL Production Requests	
		POL Calendars	
		Production Schedules/Pilot Plants	
		Project Manpower Plans	
		QA Analysis Reports	
		Suggestions	
		Synergy Meetings	
		Team Meeting Minutes	
		Weekly Reports [for Myracle's directorate = P0622 8/25/95]	
		White Papers/Position Papers	
	P0780	PURCHASE ORDERS/REQUISITIONS	C+2
		Purchase Orders	
		Purchase Orders (Non–Capital)	
R ▶	R0070	RECORDS RETENTION SCHEDULES	C+50
		Document Classification Scheme	
		PM USA Records Program & Associated Forms	
		Warehouse/Storage – Central File	
S ▶	S0810	SAFETY ISSUES	C+5
		Divisional Safety Inspection Reports	
		Emergency Response Team Equipment Inspections	

PM3000421201

Source: https://www.industrydocuments.ucsf.edu/docs/ggdl0001

	CATEGORY CODE	RECORD CATEGORY / SUB-CATEGORY	RETENTION PERIOD
		Emergency Response Team – General Environmental Health & Safety Annual Reports Forklift Inspection/Maintenance Laser Safety Committee Safety Committee – Minutes Safety Glasses Program	
	S0360	SOFTWARE	ACT
		Licenses, Software	
	S0450	STANDARDS/SPECIFICATIONS	SUP
		Engineering Standards	
	S0631	SUCCESSION PLANNING	C+1
		Succession Plans	
	S0730	SURVEYS & STUDIES	C+3
		Continuous Improvement Team Surveys, Attitude Surveys, Benchmark Task Forces	
T ▶	T0380	TRAINING & DEVELOPMENT	C+2
		Safety Training Records Training & Development	
V ▶	V0120	VOUCHERS	C+1
		Cash Vouchers	

PM3000421202

Source: https://www.industrydocuments.ucsf.edu/docs/ggdl0001